

For Rating Officials –

Closeout Assessment

Create a Closeout Assessment:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the employee's name to view the *Rating Official Review* page.
3. Scroll down to Closeout Assessments and select the **Create Closeout Assessment** button.
4. Scroll down again to Closeout Assessments, and you will see that the Closeout Assessment fields are now available.
5. Enter information into the **Rating Official Assessment for Closeout Assessment** field.
6. Select the **Save** button to remain on the *Rating Official Review* page. The Closeout Assessment is now in a PENDING status.
7. Select one of the following:
 - Select the **Transfer to Employee** button.
 - Select **Logout** at the top right side of the page to exit.

Update an Existing Closeout Assessment:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the Employee's name to view the *Rating Official Review* page.
3. Scroll down to Closeout Assessments.
4. Select the pencil icon in the Update column under Closeout Assessments.
5. Scroll down again to Closeout Assessments, and you will see that the Closeout Assessment fields are now available.
6. Enter information into the **Rating Official Assessment for Closeout Assessment** field.
7. Select the **Save** button to remain on the *Rating Official Review* page. The Closeout Assessment remains in a PENDING status.



8. Select one of the following:
 - Select the **Transfer to Employee** button.
 - Select **Logout** at the top right side of the page to exit.

Document Completion of a Closeout Assessment:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the Employee's name to view the *Rating Official Review* page.
3. Scroll down to Closeout Assessments.
4. Select the pencil icon in the Update column under Closeout Assessments.
5. Scroll down again to Closeout Assessments, and you will see that the Closeout Assessment fields are now available.
6. Select the calendar icon to the left of the **Communication Date** field.
7. Use the popup calendar to select the date the Closeout Assessment was communicated to the employee,
8. Select the blue down arrow inside the right side of the **Communication Method** field and select the method you used to communicate the Closeout Assessment to the employee.
9. Select **Complete** on the right side of the page, across from the communication date and method.
10. Select the **Save** button to remain on the *Rating Official Review* page. The Closeout Assessment is now in a COMPLETED status.
11. Select one of the following:
 - Select the **Transfer to Employee** button.
 - Select **Logout** at the top right side of the page to exit.

